



# FIRST QUARTER 2013 MARKETING REPORT

**Lynn Berry**

Director of Communications

*Branson/Lakes Area Chamber of Commerce & CVB*

# TODAY'S PRESENTATION

- Economic Overview
- Travel Industry Outlook
- First Quarter Branson Update

# BRANSON

*It's Your Show*

## ECONOMIC OVERVIEW



# U.S. UNEMPLOYMENT RATE



**7.6%**

**Unemployment** is now at **7.6%** and has remained under 9% since November 2011.

In fact, U.S. unemployment has decreased each of the past 2 months.

# CONSUMER CONFIDENCE

**Consumer Confidence** now stands at **68.1** where **90** is considered necessary for sustainability and 100 is required for growth.

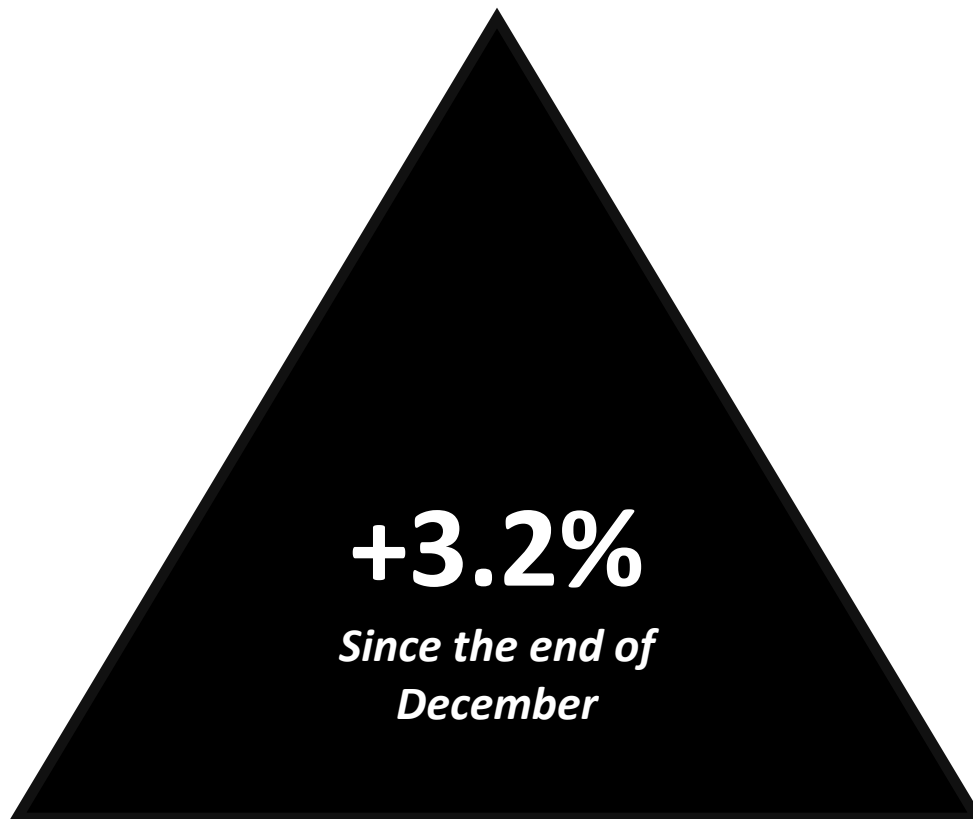


**+2.1%**

*Since Dec '12*

The last time the consumer confidence index was at 100 or higher was in **August 2007** when it was **105.0**.

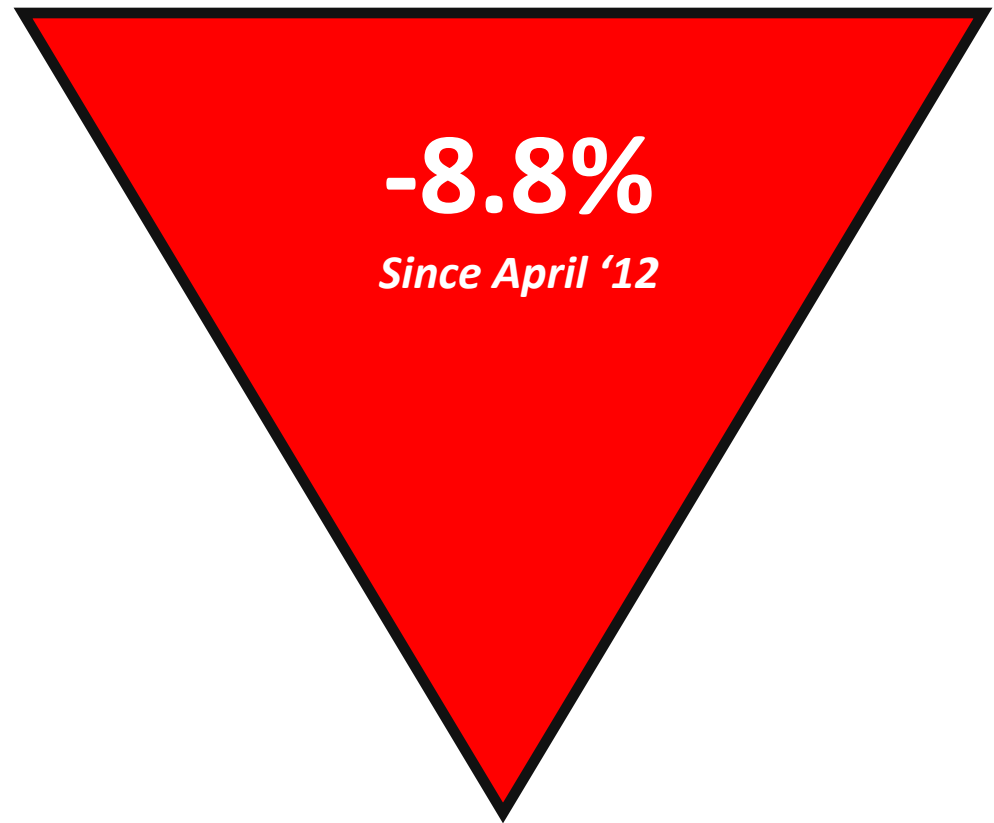
# INDEX OF WEEKLY LEADING INDICATORS



The Economic Cycle Research Institute's Weekly Leading Index® (WLI) for the U.S. has increased 3.2 percent since the end of December to 130.6 with an annualized growth projection of +6.8%.

# U.S. AVERAGE GASOLINE PRICES

The average U.S. Regular Convention Retail Gasoline Price averaged **\$3.50 per gallon the last week of April 2013, down 8.8%** from April 2012. But, as we all know prices have been increasing in recent weeks.



# SMITH TRAVEL ROOM DEMAND

U.S. room demand was up 4.4% in April 2013.

Occupancy rates are hovering near 60%, up more than 1 full point over the previous 12 month period.



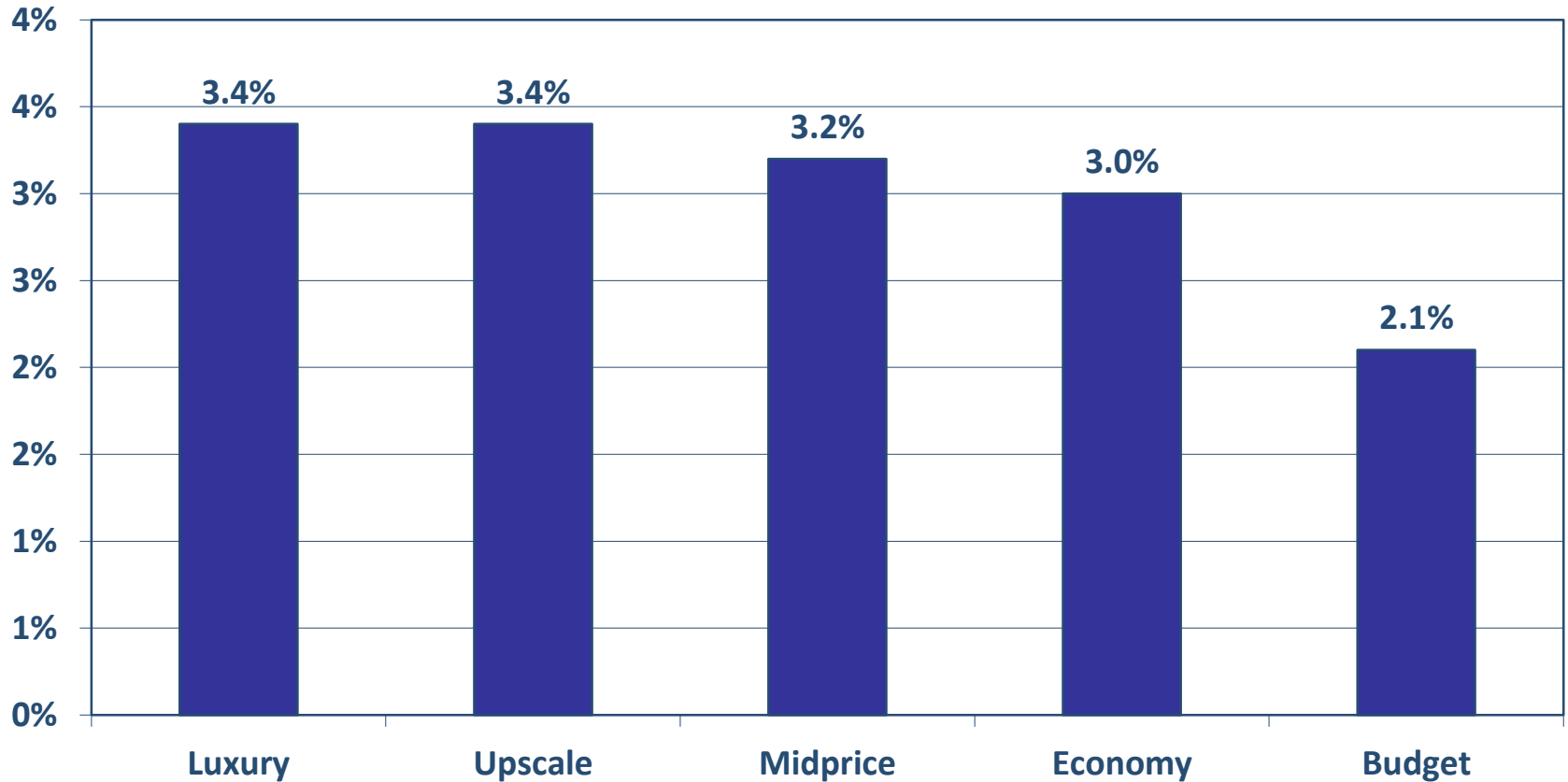
**+3.0%**

*Over Past 12 Months,  
May '12-Apr '13*



# SMITH TRAVEL RESEARCH

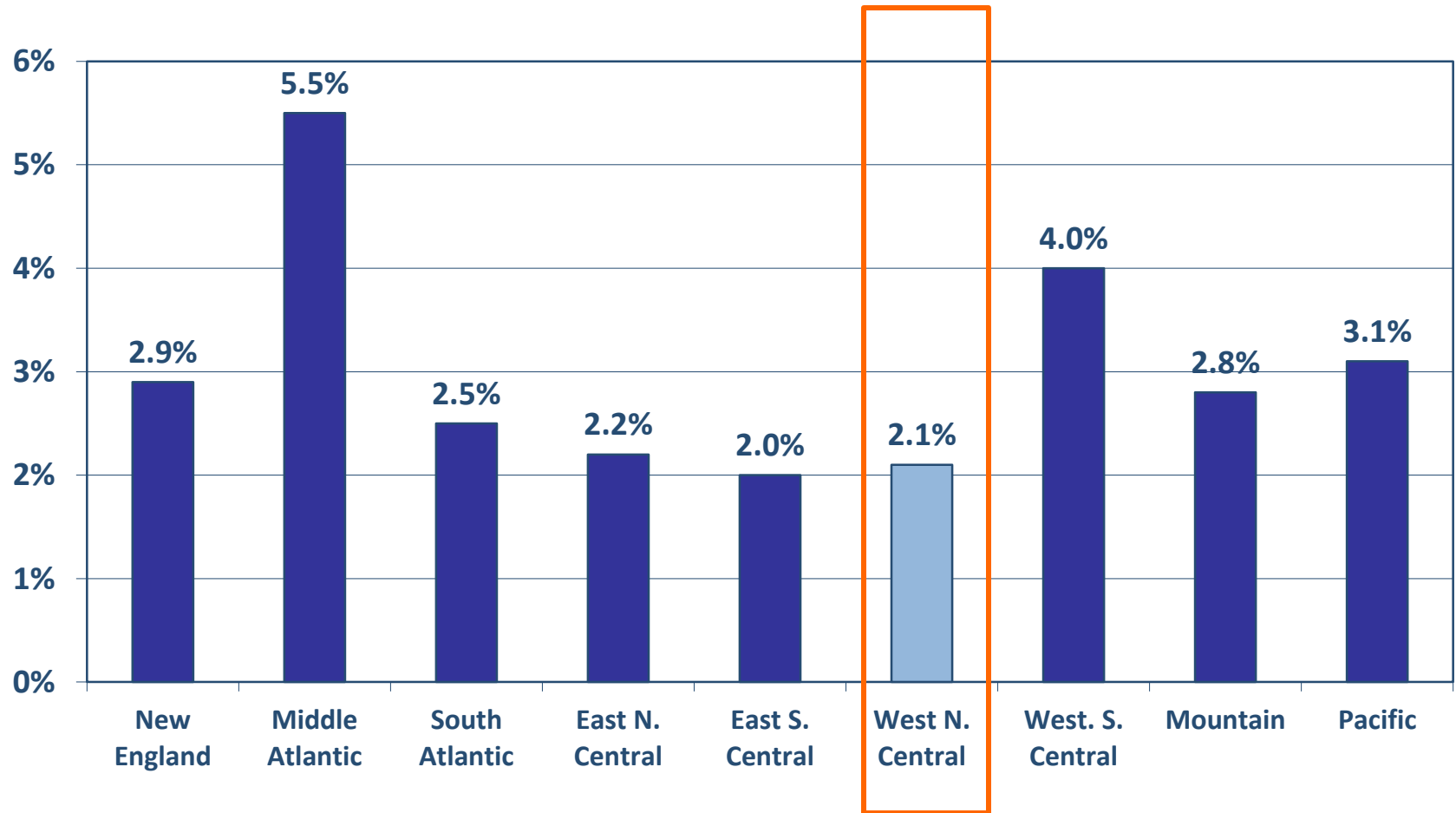
## ROOM DEMAND BY PRICE



SOURCE: Smith Travel Research data for the USA as a whole

# SMITH TRAVEL RESEARCH

## ROOM DEMAND BY REGION



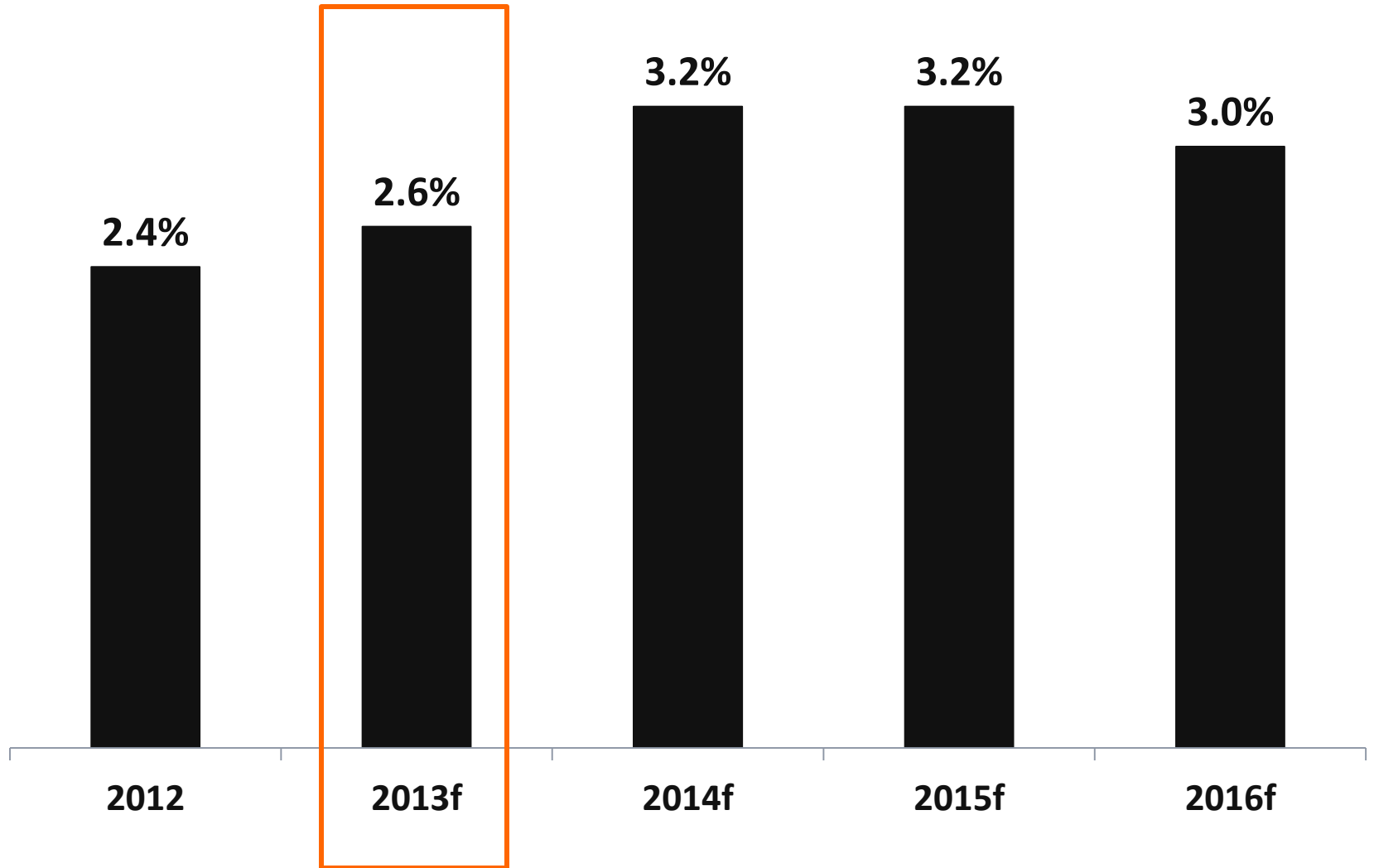
SOURCE: Smith Travel Research data for the USA as a whole

BRANSON  
*It's Your Show*

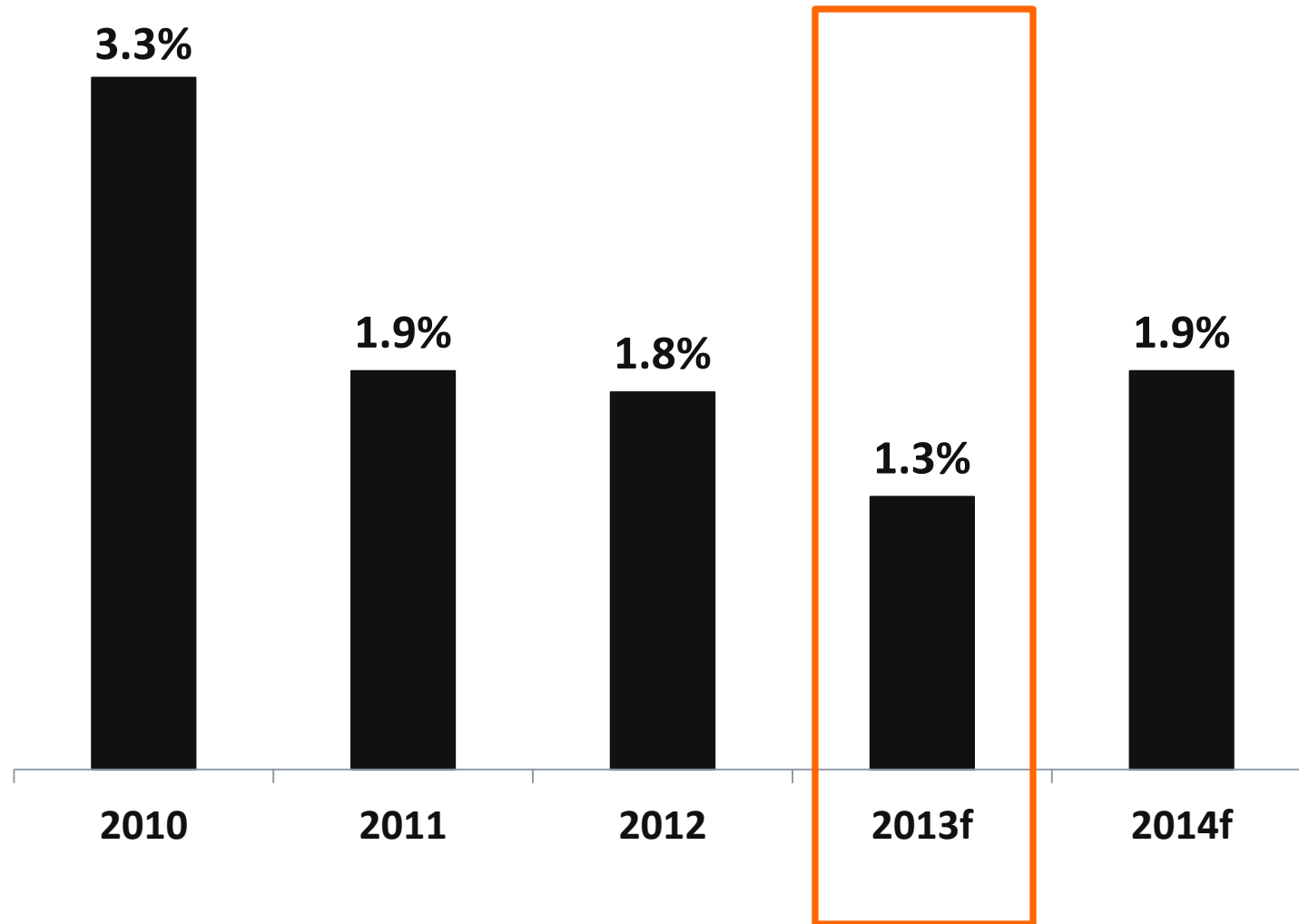
# TRAVEL INDUSTRY OUTLOOK



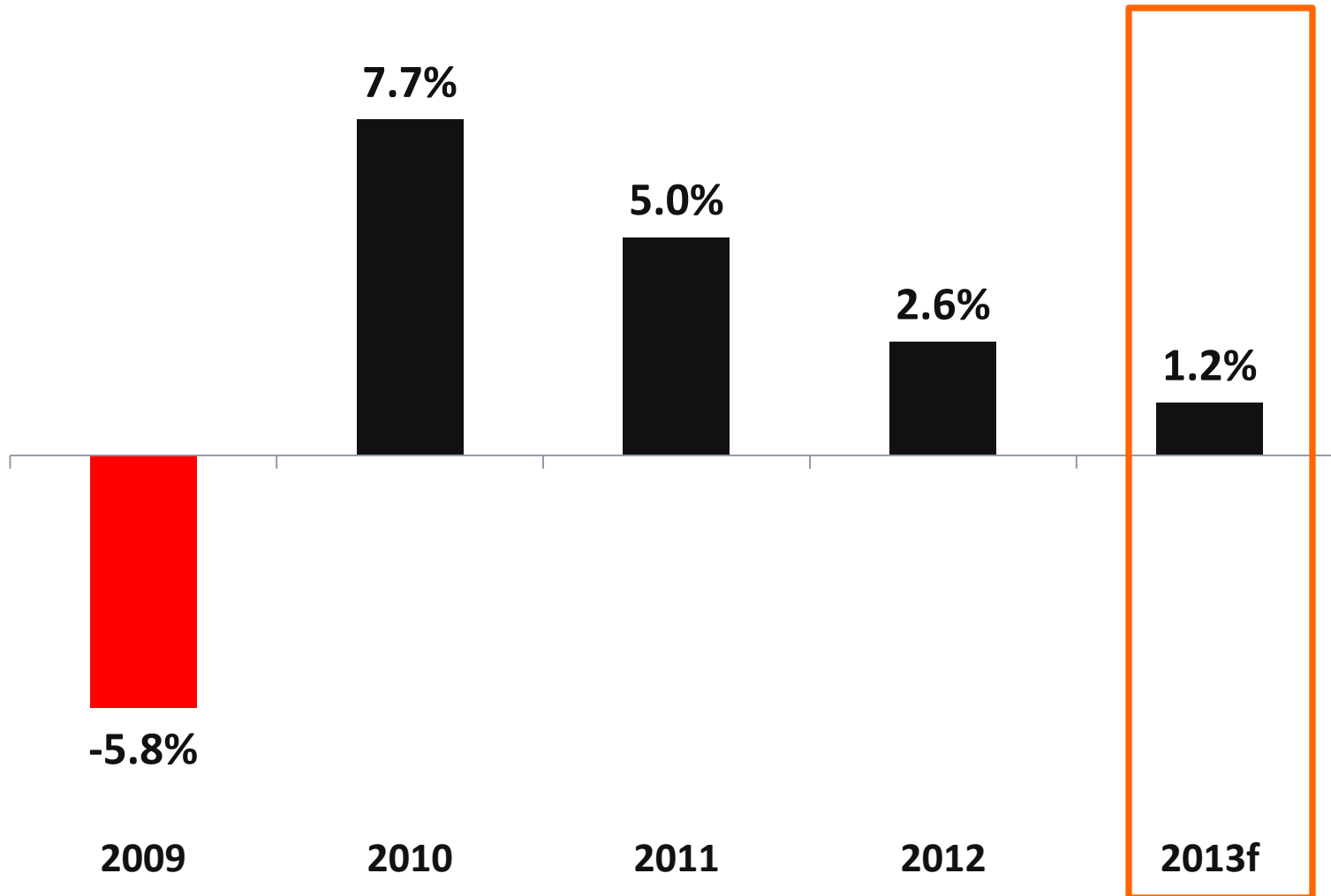
# **THE U.S. ECONOMY WILL GROW SLOWLY IN 2013 BEFORE TAKING OFF.**



# **U.S. LEISURE TRAVEL IS PROJECTED TO GROW BY ONLY 1.3% IN 2013.**



# U.S. ROOM DEMAND WILL ALSO GROW MORE SLOWLY IN 2013.



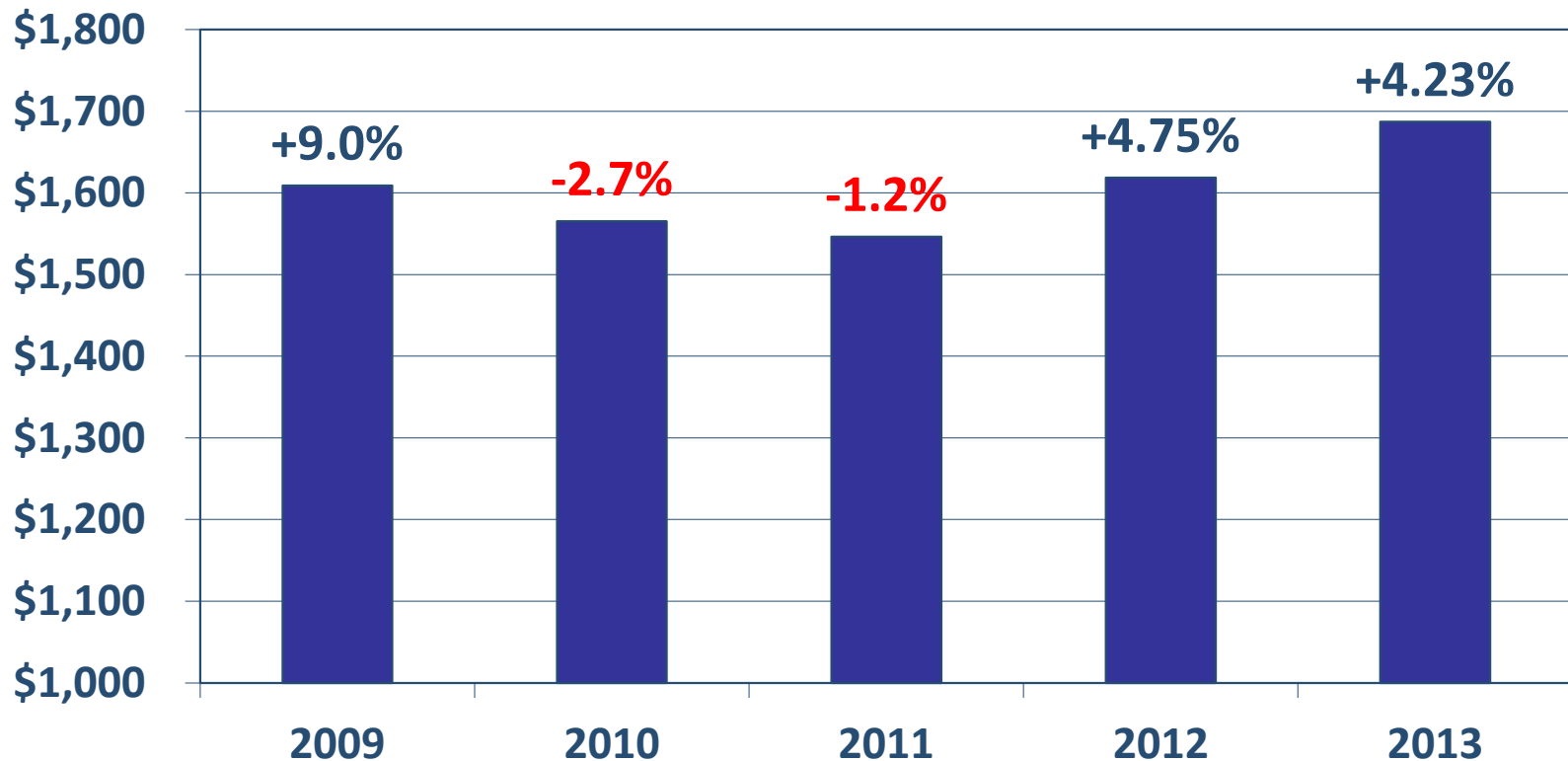
# BRANSON

*It's Your Show*

## FIRST QUARTER UPDATE

A series of horizontal lines in light blue and white, extending across the width of the slide below the 'FIRST QUARTER UPDATE' header.

# CITY OF BRANSON SALES TAX FIRST QUARTER 2009-2013

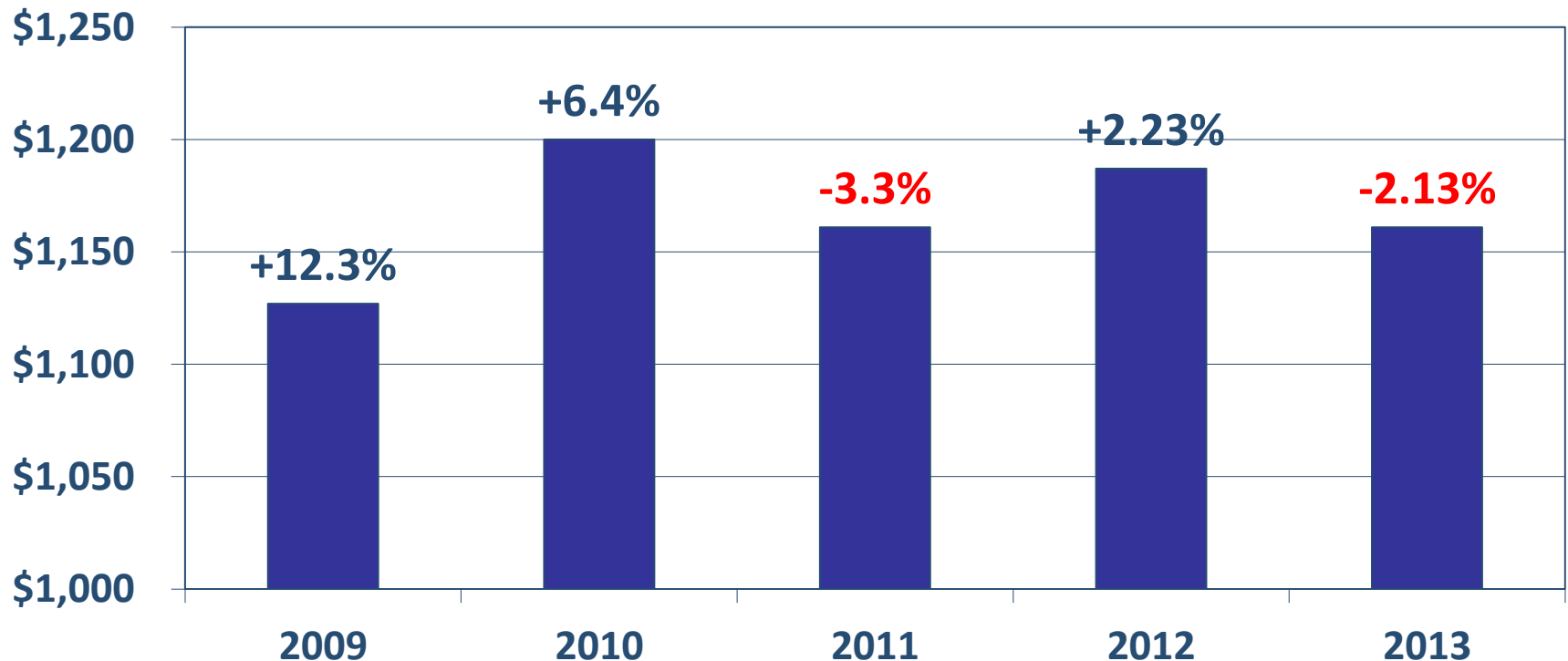


Source: City of Branson



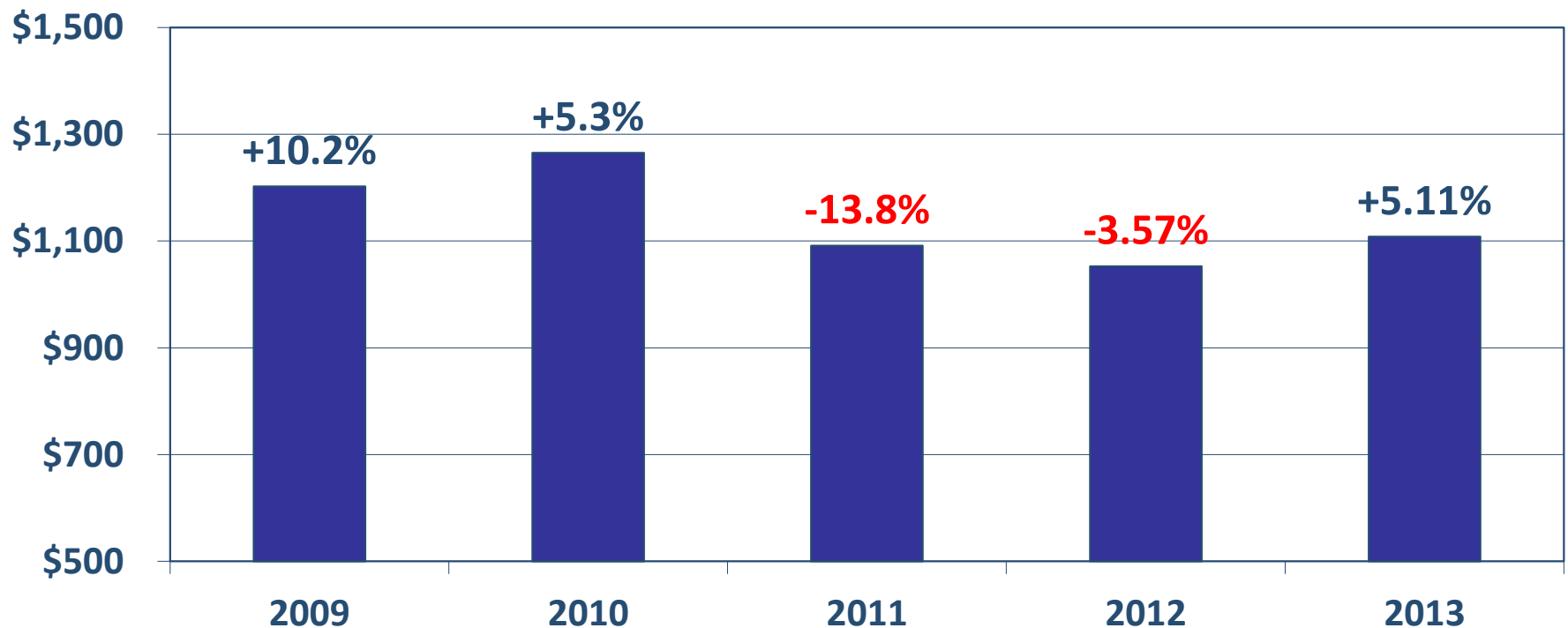
# TCED TOURISM TAX

## FIRST QUARTER 2009-2013



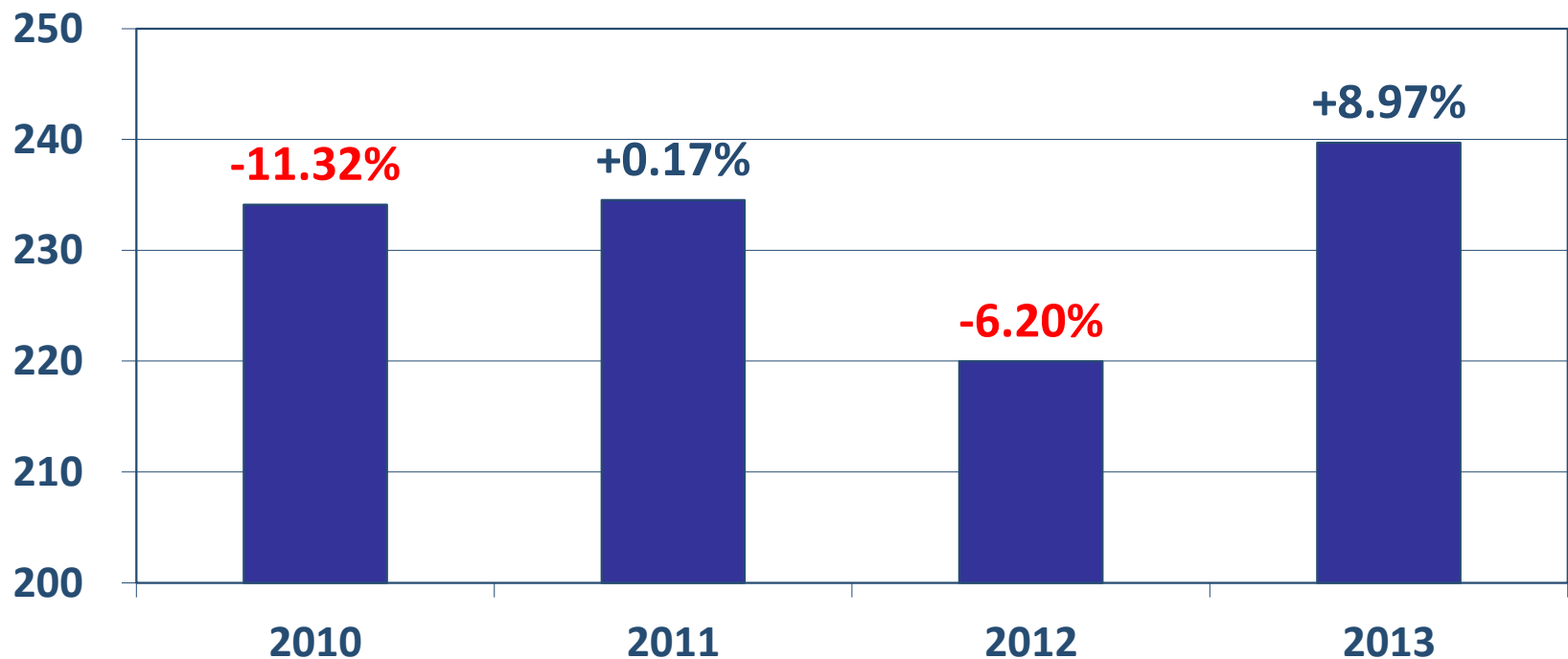
Source: TCED

# CITY OF BRANSON TOURISM TAX FIRST QUARTER 2009-2013



Source: City of Branson

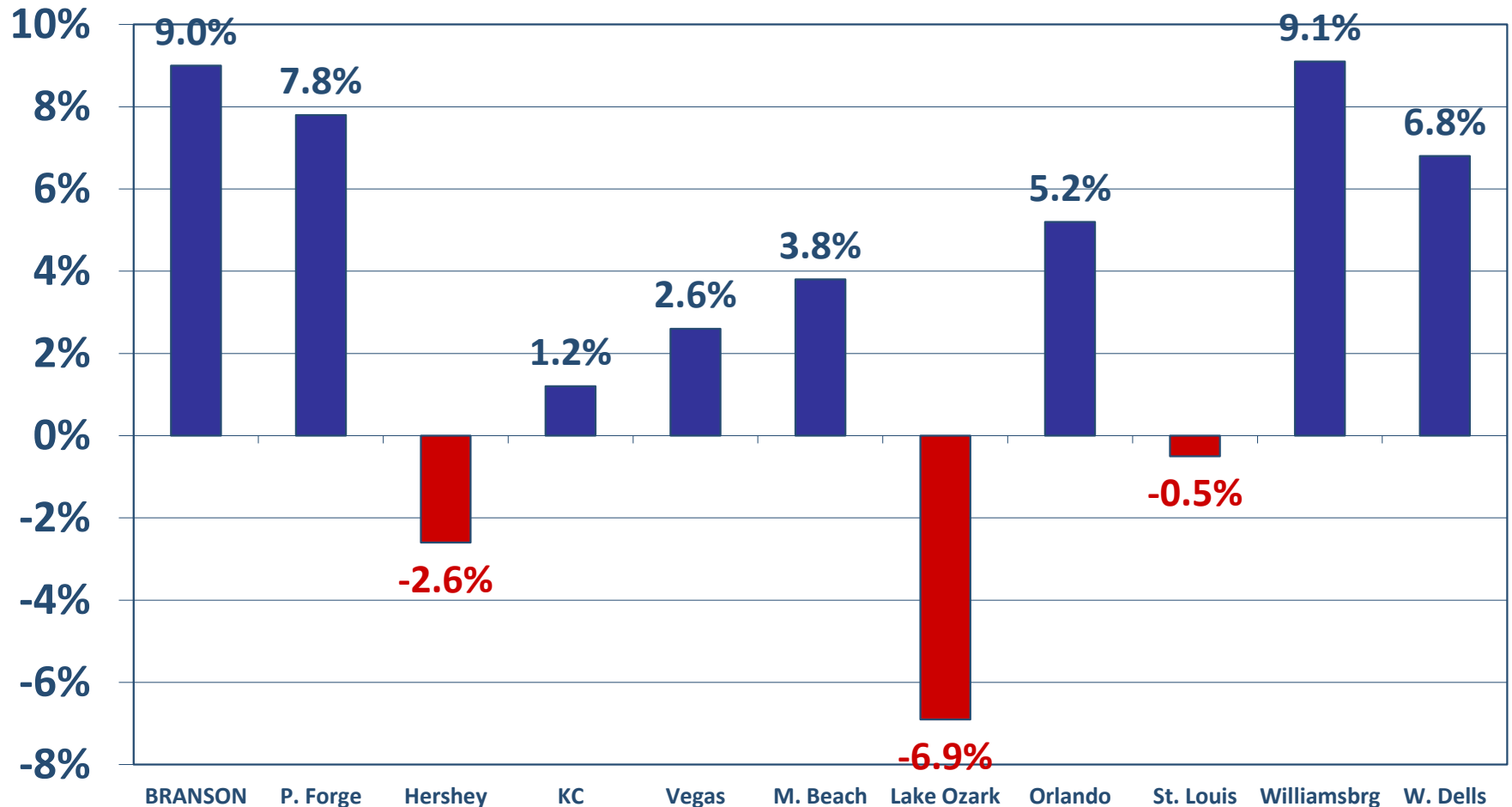
# BRANSON ROOM DEMAND FIRST QUARTER 2010-2013



Source: Smith Travel Research

# DIRECT COMPETITORS

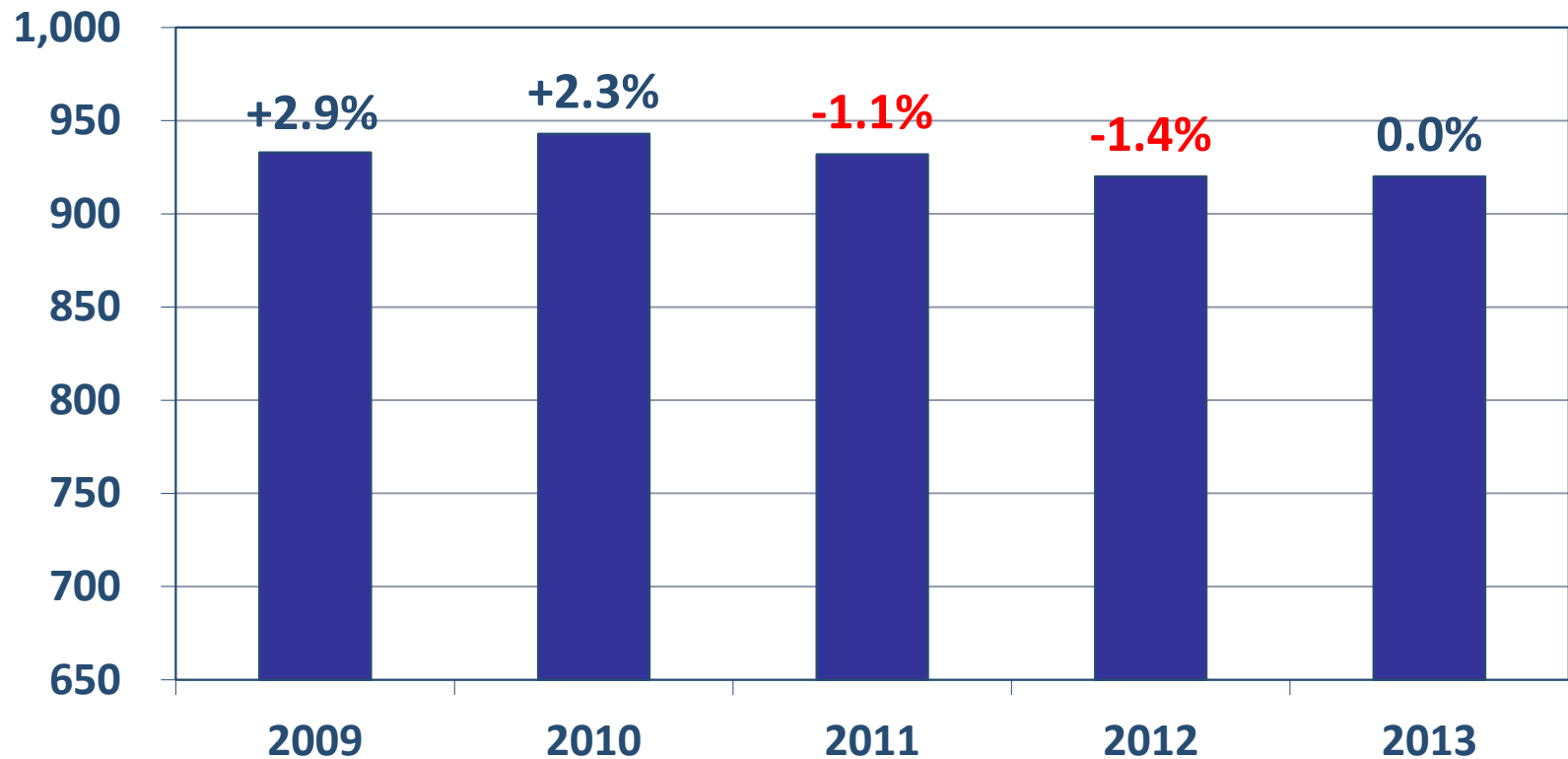
## FIRST QUARTER ROOM DEMAND



Source: Smith Travel Research

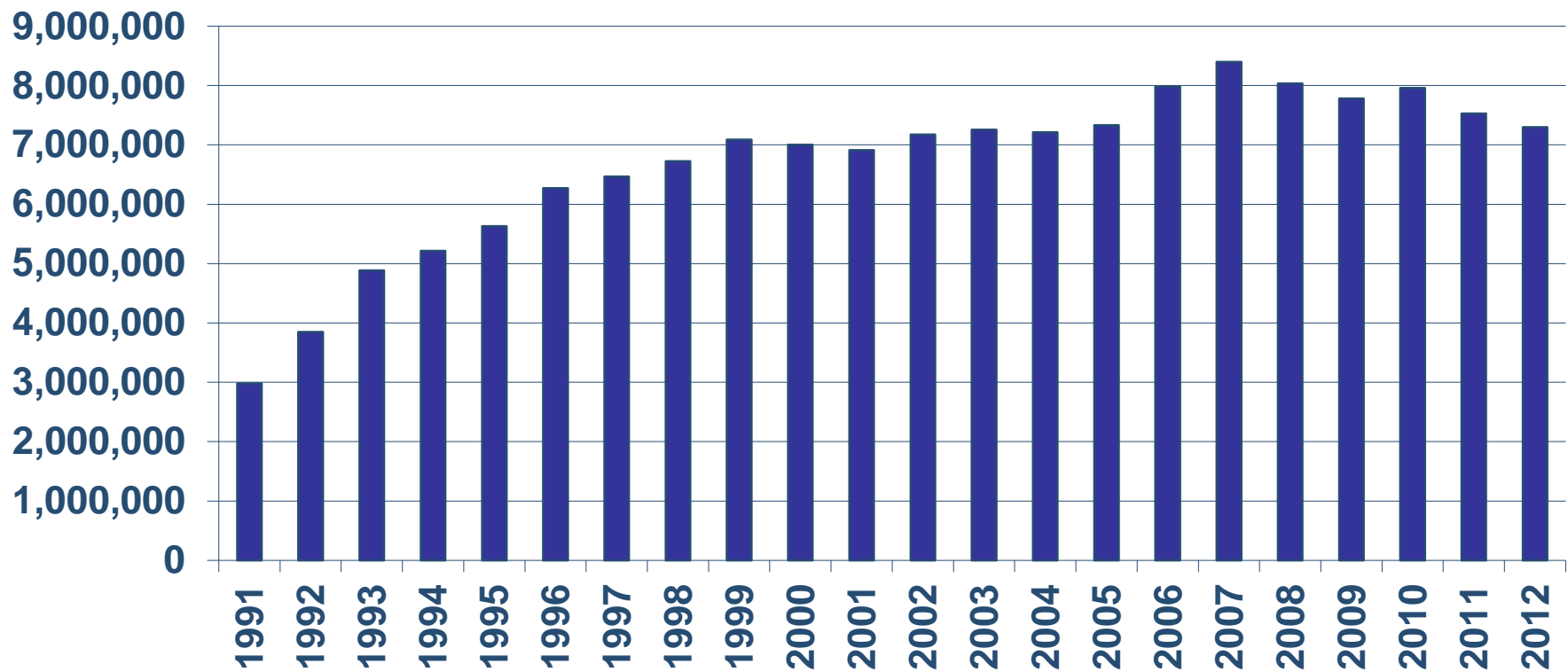
# BRANSON VISITATION

## FIRST QUARTER 2009-2013



Source: City of Branson

# HISTORY OF BRANSON VISITATION 1991 - 2012



# BRANSON

*It's Your Show*

## BRANSON 1<sup>ST</sup> QUARTER 2013



**What else  
do we know?**

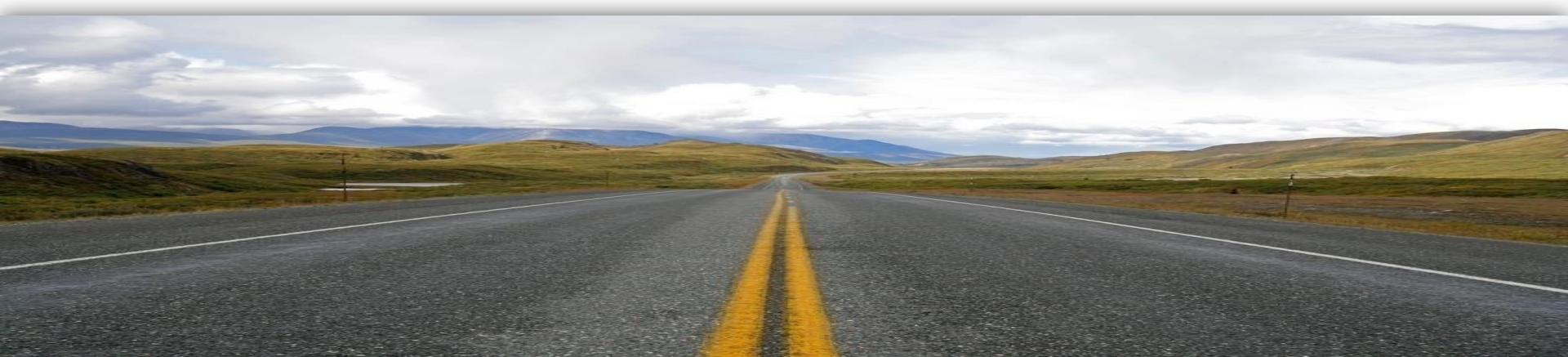
# 1<sup>ST</sup> QUARTER YTD VISITOR PROFILE

	2013	2012
Spending per Party	\$752	\$732
First-Time Visitors	20.3%	19.9%
Families	35.4%	36.8%
Average Adult Age	57.4 years	54.4 years
Decision to Visit	56.2 days	42.2 days
Saw Shows	70.8%	65.8%
Number of Shows	2.40	2.43



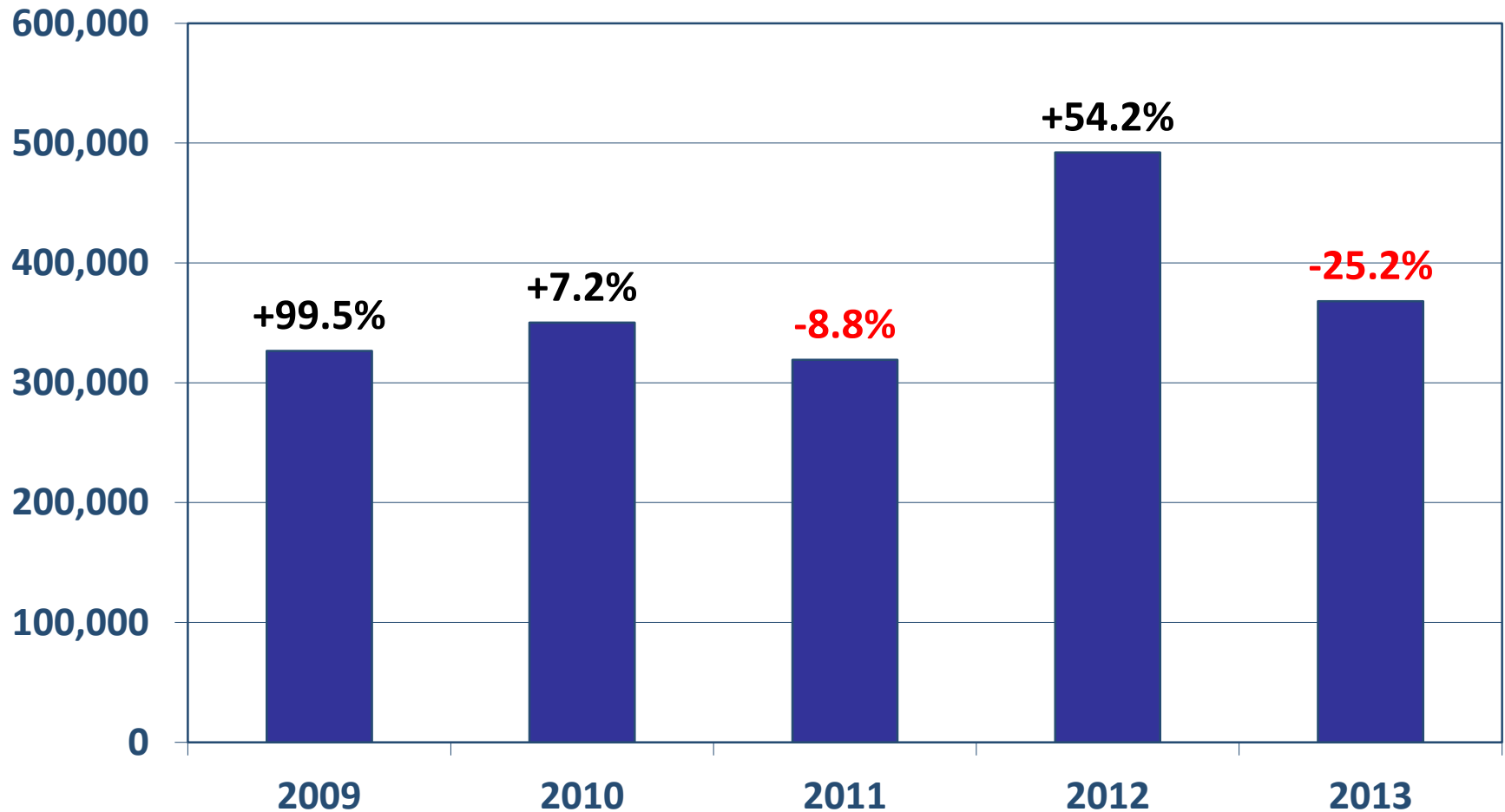
# 1<sup>ST</sup> QUARTER YTD VISITATION BY MARKET

	2013	2012
Core Markets (0-100 mi.)	22.8%	19.2%
Primary Markets (101-300 mi.)	36.5%	34.3%
Outer Markets (301-650 mi.)	23.9%	26.8%
National Markets (650+ mi.)	16.9%	19.6%



# WEB INQUIRIES

## FIRST QUARTER 2009-2013



# YTD 2013 PUBLIC RELATIONS: AD EQUIVALENCY VALUES

**PR Ad Equivalency tracked down 50% in the first quarter of 2013 (\$2.5M vs. \$5M in 2012), largely reflecting our extensive post-tornado coverage last year; keep in mind, however, that the message was “Branson is Open for Business” and it was widely covered.**



# 2013 STRATEGIC PLAN

**Execute strong brand strategy with Camelot Communications media buy, and continue public relations efforts to drive new visitation to our Branson/Lakes Area this year.**







*It's Your Show*